CCH Axcess™ Workstream

Welcome to CCH Axcess Workstream 2016-5.0

This bulletin provides important information about the 2016-5.0 release of Workstream. Please review this bulletin carefully. If you have any questions, additional information is available on CCH Support Online.

New in this Release

Grouped Worksteps
To allow you to more effectively organize a project's workflow, you can now create workstep groups. Groups are a convenient way of noting work that occurs concurrently or a collection of worksteps that must be completed before moving on to the next major step in the workflow. Simply select the worksteps you want to group and, using the button on the button bar above the workstep grid, create a new group or add them to an existing group. When viewing the worksteps in a project or on the route sheet, you can expand the group row to see the individual worksteps it contains. The group parent row shows the summary of the budgets, along with the earliest planned start date and the latest planned finish date of the child worksteps. The group is considered complete once all worksteps it contains are marked complete. You can also have the completion of a group set a project status. You can also create groups in a template. The groups will copy down to the projects created from the template.

Timely Form Due Date Updates
Effective November 15, 2017, you no longer must wait for a Workstream release to get updated form due dates when the dates are changed by a regulatory agency. We have linked each Workstream-supplied form to the corresponding form in the tax calendar maintained by our partner, CCH® IntelliConnect®. Within two business days of a form update in the IntelliConnect tax calendar, the revised due dates can be downloaded into the Workstream form library and used to update form due dates in your projects.

Notification When Maintenance is Complete
You can choose to be notified when server maintenance is complete and CCH Axcess is available. See Configuring Notifications for information about how to enable this option for your firm and choose the email addresses to receive the notification. Your recipient choices for CCH Software News are not affected by CCH Axcess notification settings.

Technical Issues

Update Multiple for CRS Change
When a project has worksteps assigned based on client responsible staff (CRS), and the staff assigned to the CRS position for the client changes, you can now use the update multiple utility to also change the assignment for the worksteps to the new staff.

Pool Complexity Filter
Filtering the pool based on complexity now works consistently.

My Assignments Status
The status column in My Assignments now consistently shows the project status.

Exception Index When Doing a Lookup
The "exception index out of range" error that occurred occasionally when performing a lookup has been addressed.

Open Workstep
When using a project view, the Open Workstep column will always show the first workstep that is not complete, based on the assigned order number.

Report Corrections
The following corrections have been made for Workstream reports:

- The Project Summary report now properly filters based on the client responsible staff assigned to the client.

- Project Delivery Method was removed from the Project Summary report filter options.

- The Project Forms report no longer includes internal projects.

- The Project Forms report now displays all projects when "All" is selected for the Project Status filter.

- The Staff Workstep Estimates Worksheet has changed to properly display budget hours and amounts when assigned on the workstep Budgets tab.

- The Staff Workstep Estimates Worksheet now properly displays actual hour and amounts.

- The Project File Holder History report now shows "in the pool" projects properly when filtering by file holder.

- The Project Budget to Actual report now correctly groups by the client responsible staff.

- For all reports, selecting "All" for the *Works from pool* filter now includes all projects.